

Following his disappearance, supporters of Al-Zubaidi erected a large billboard bearing his image and the title “Presidency of the Southern Arabian State” on a garrison near the southern gate of the Presidential Palace (Al-Ma’ashiq) in Aden on 7 December 2025.

Aidarous al-Zubaidi, the Chairman of the UAE-backed Southern Transitional Council (STC), did not travel to Riyadh as expected, despite earlier reports that he and a delegation of 56 members were en route to Saudi Arabia for political talks. The trip was meant to follow the rapid collapse of STC forces in eastern Yemen, where Saudi-backed government troops reversed STC gains in less than 48 hours. Today, Riyadh appears to be pursuing a new peace through strength policy in southern Yemen. The STC’s crumbling and humiliating defeat placed intense pressure on al-Zubaidi to accept a political settlement and temporarily leave Aden.

The following report provides a detailed Situation Report (SITREP), examining the developments that led to the current situation and offering an analysis of the factors behind it, along with an assessment of potential future trajectories.

The security situation in Aden remains calm and stable, with the STC coordinating with the Southern Giants Brigades through the Deputy Governor of Aden for Defense and Security Affairs, Brigadier Air Force Abdulaziz Al Mansouri, while the Giants have not assumed full control over all security responsibilities and the Counterterrorism Services (CTS) and Security Belt forces remain deployed on the ground operating under the supervision and command of Abdulrahman Saleh Zain Aqeel al-Mahrami, known as Abu Zara’h al-Mahrami.

The Third Southern Giants Brigade, led by Brigadier General AbdulFattah Al Saadi, has been deployed to Aden, with the handover carried out peacefully in coordination with other STC affiliated units, and the Southern Giants Forces, represented by Brigade 31 commander Abdullah Al Jayed, are currently securing the districts of Sheikh Othman and Al Mansoura. It has been confirmed that the Giants Brigades have established control over several key strategic sites, including the Central Bank of Yemen, Aden International Airport, the Al Ma’ashiq Presidential Palace, the Judiciary Complex, and the Prime Minister’s Office, and they have also halted looting at the arms depots in Jabal Hadeed, which reportedly continued for three days.

At the time, it was unclear whether Al-Zubaidi’s departure would be temporary or permanent, or whether he would be allowed to return. The moment marked a sharp turn at the end of 2025 and the start of 2026, as Saudi Arabia appeared to assert its influence in southern Yemen through a combination of political pressure and limited military action. Al-Zubaidi’s reported decision to attend the South–South Yemen Conference in Riyadh initially helped calm tensions in Aden and halted the immediate expansion of the Saudi-backed Camps Handover Operation (CHO) into the city.

Diplomats told Basha Report that it appears Riyadh wanted all STC leaders to be in Saudi Arabia by the time Prince Faisal bin Farhan, who is currently in Washington, D.C., meets with Secretary of State Marco Rubio in order to declare a full victory in Yemen.

Saudi-backed forces moved at the same time to consolidate control across southern Yemen. In Hadramawt, the Second National Shield Forces (NSF) division and the Third Yemen Emergency Forces division (YEF), working with Hadrami tribes, rolled back STC influence in areas close to the Kingdom's southern border. Political and security pressure was also applied in Shabwah, Lahij, Abyan, and al-Mahra to bring those governorates more firmly under the authority of the internationally recognized government.

In Aden, the Southern Giant Brigades took control of the outer gates of the Presidential Palace at al-Ma'ashiq, while images circulated showing their commander, Abu Zara'h al-Mahrami, in Riyadh for meetings with senior Saudi officials and members of Yemen's Presidential Leadership Council (PLC).

The STC's Presidential Storm Forces, under Major General Awsan Fadl al-Anshli, were redeployed across the city to maintain security, prevent looting, and avoid a repeat of the instability witnessed in al-Mahra and Hadramawt. The NSF were not deployed to Aden that day. What occurred in the city should not be described as a coup or a collapse, but rather as a temporary, negotiation-driven political settlement.

In Shabwah, Governor Awadh bin al-Wazir al-Awlaki conducted a nighttime tour of Ataq to ensure that unrest seen in neighboring governorates did not spill over. Security forces mobilized across the governorate, and al-Awlaki reaffirmed his support for the Saudi-led South-South peace process and his loyalty to the internationally recognized government.

Meanwhile, the Security Committee of Abyan Governorate, chaired by Governor Major General Abu Bakr Hussein Salem, issued a statement emphasizing the need to shield Abyan from armed conflict, terrorism, and Houthi threats. The committee welcomed the deployment of National Shield Forces to enhance stability and expressed appreciation to the Saudi-led coalition for supporting legitimacy and regional security.

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Security forces loyal to the STC were redeployed across Aden to prevent looting and maintain order. The NSF has not yet deployed inside Aden city, but the NSF is expected to be deployed across all regions of Yemen. The situation remains tense but largely contained.

Local residents organized informal checkpoints in some neighborhoods to protect property, although isolated looting incidents were reported, including at a media outlet linked to the STC. Airstrikes were later reported in al-Dhale', al-Zubaidi's home governorate, with at least one strike appearing to hit an ammunition site, producing secondary explosions.

Confusion deepened when conflicting reports emerged roughly thirty minutes after the flight was said to have departed. Some sources claimed al-Zubaidi never boarded the aircraft, while others said he arrived at the airport but did not get on. A third account suggested he boarded and later disembarked. Shortly afterward, he disappeared from public view.

Within minutes, large billboards appeared across Aden bearing al-Zubaidi's image alongside the emblem of the Presidency of the Southern State, fueling speculation about his intentions.

The STC later issued a statement confirming that al-Zubaidi was not in al-Dhale' and remained in Aden, where it said he continued to oversee political, security, and administrative affairs. The statement described him as closely supervising state institutions and security forces to maintain stability in the capital and other southern governorates.

In contrast, officials within the Saudi-led coalition said al-Zubaidi's precise whereabouts were unknown, adding another layer of uncertainty to an already volatile situation.

Al-Zubaidi's decision not to travel to Riyadh appears rooted in political survival. Leaving Aden under the prevailing conditions may have risked preventing his return or reducing him to a symbolic figure abroad.

Remaining allowed him to preserve influence on the ground and avoid an outcome that could have ended his political relevance. His background also points to a willingness to endure pressure. Al-Zubaidi rose from armed resistance in al-Dhale' and built his reputation in conflict zones rather than conference halls. The rugged terrain of his home governorate has long offered strategic depth that a city like Aden cannot.

Preparations for a possible confrontation appeared to have been underway even before the flight was announced. In the days leading up to it, Saudi-aligned media reported the movement of weapons and military equipment out of Aden, including from sites such as Iron Mountain and al-Ma'ashiq Palace. These actions suggested planning rather than collapse, and indicated an effort to preserve military assets away from the capital.

The manner in which the Saudi ultimatum was delivered also appears to have mattered. Al-Zubaidi was reportedly given 48 hours and expected to travel on a commercial flight. For a "self-proclaimed President" whose authority depends heavily on perception and rank, leaving under such terms would have carried a political cost. After the STC's rapid loss of territory in Shabwah, Hadramawt, and al-Mahra, his negotiating position was already weakened. Staying may have been an attempt to force talks without appearing defeated.

Speculation has expanded to include more extreme scenarios, ranging from alleged coordination with the Houthis to indirect assurances of recognition by foreign powers, including but not limited to Israel, Russia, and UAE. These claims remain unsupported by evidence and are widely viewed as unlikely.

Deep political and ideological divisions make any sustained alliance with the Houthis improbable, and there are no credible signs that any state is prepared to recognize a shrinking southern entity or use it as a platform for military operations.

As tensions rose, Yemen's PLC convened an emergency meeting and accused al-Zubaidi of high treason. The council revoked his membership, dismissed two ministers affiliated with the STC, and ordered arrests linked to weapons distribution and threats to civil peace. The STC

condemned Saudi airstrikes in al-Dhale', expressed concern over losing contact with parts of its delegation in Riyadh, and reiterated its commitment to dialogue, calling for guarantees of safety as a condition for meaningful talks.

For now, Aden remains uneasy but largely calm. No large-scale fighting has erupted between southern factions, and Saudi-aligned forces appear to be expanding their presence around government-held areas. Whether al-Zubaidi's decision to stay marks the start of a new phase of confrontation or a pause before renewed negotiations remains uncertain. What is clear is that the aborted flight has reshaped the political landscape in southern Yemen and exposed the fragile balance between force and diplomacy.

First, political survival and principle.

Al-Zubaidi likely assessed that leaving Aden under the current circumstances would mean he would not be allowed to return. At best, he would become a so-called guest of Saudi Arabia in Riyadh or Jeddah. At worst, he risked being sidelined or quietly relocated to an African region aligned with Abu Dhabi. Either scenario would effectively end his political relevance. By creating ambiguity around his departure, he bought time to preserve leverage, delay irreversible outcomes, and maintain his position on the ground.

Second, a deliberate return to insurgent roots.

Al-Zubaidi's political career began as an armed resistance fighter in al-Dhale'. He has not achieved his primary objective of securing an independent southern Yemeni, or South Arabian, state. Al-Dhale's rugged terrain, dispersed population, and mountainous geography make it far more suitable for prolonged resistance than Aden. Choosing not to depart suggests an intention to shift from political management in the capital to strategic endurance from a more defensible base.

Third, preparation had already been underway.

In the days leading up to the reported flight, Aden-based outlets openly reported the movement of weapons and military equipment out of Aden. Arms were relocated from al-Hadeed [Iron Mountain], Sulaban base, al-Ma'ashiq Palace, and other strategic sites. These actions pointed not to collapse, but to a planned redeployment consistent with preparation for sustained confrontation rather than immediate governance.

Fourth, humiliation and loss of status.

The manner in which the ultimatum was delivered appears to have played a significant role. Al-Zubaidi was given 48 hours, was not provided with a private aircraft, and was expected to travel on a commercial flight. Symbolically, this underscored a shift in how he was viewed, from a partner to a figure being managed. For a leader whose authority rests heavily on perception, compliance under such conditions would have carried a high political cost.

Fifth, external calculations.

Some analysts, particularly within long-standing anti-UAE political circles, argue that following the rapid collapse of UAE-backed forces in eastern Yemen within 48 hours, Abu Dhabi may have quietly encouraged al-Zubaidi to pursue a limited insurgency in al-Dhale' to preserve face

for both the STC and its backers. While unproven, this interpretation continues to circulate and cannot be fully dismissed.

Sixth, leverage through confrontation.

After the STC's expansion into eastern Yemen unraveled in 48 hours, al-Zubaidi's negotiating position was badly weakened. By choosing resistance over compliance, he may be attempting to reset the balance, forcing Saudi Arabia and the internationally recognized government to engage him not as a defeated actor, but as a continuing variable that must be accounted for.

Seventh, and most unlikely, coordination with the Houthis.

Rumors have circulated suggesting that al-Zubaidi may be seeking a new alignment with the Houthis to counter the Saudi-backed government. While such a development would represent a dramatic and historically inconsistent shift, it cannot be entirely ignored. Reports earlier this week hinted that some forces linked to the STC were exploring arms sales to the Houthis along border areas. If true, this would likely reflect tactical opportunism rather than a strategic alliance. Deep ideological hostility, a legacy of direct conflict, and incompatible political objectives make any formal or sustained partnership between al-Zubaidi and the Houthis highly improbable.

Eighth a highly speculative external-recognition scenario.

One possibility, though highly unlikely, is that al-Zubaidi may have received indirect signals from an external power suggesting potential recognition of a southern state under specific regional conditions. This theory has gained limited traction amid heightened regional attention on Israel and shifting security dynamics in the Red Sea and Horn of Africa, including Israeli activity near Somaliland. Proponents of this view speculate that Israel, seeking additional pressure points against the Houthis, could view a friendly southern entity as a future security partner or logistical node.

That said, this scenario faces significant obstacles. Formal recognition would carry major diplomatic costs, risk escalation with regional actors, and conflict with existing international frameworks on Yemen. There is no credible evidence at this stage to suggest that such recognition is imminent or that southern Yemen would be used as a launch platform against the Houthis. At most, this theory reflects how al-Zubaidi and his supporters may be interpreting the current regional moment, rather than a concrete policy shift by any external actor.

Al-Zubaidi's actions appear to be calculated rather than impulsive. They reflect a convergence of political survival, strategic repositioning, wounded prestige, and an effort to regain leverage after a rapid and public series of setbacks.

One of the leading and widely circulating assessments is that Al-Zubaidi departed Aden by small maritime vessels, possibly heading to one of the Red Sea islands such as Zuqar Island or Mayun Island. Other emerging rumors and preliminary intelligence assessments suggest he may have traveled by boat to Somaliland and then been flown onward to Abu Dhabi.

The prevailing analytical view at this time is that he is unlikely to lead an armed rebellion and has instead exited Aden via maritime routes.

If al-Zubaidi's location is identified in Aden or any government-controlled area, he would most likely face a capture-or-kill directive, or a Saudi surgical airstrike could bring this chapter to an end. None of the possible outcomes for him at this point are positive.

A less likely scenario suggests that he defected to the Houthis, given that Al-Dhale' is a frontline border area with Houthi forces; however, this assessment lacks strong corroboration.

Meanwhile, his supporters continue to claim that he remains in Aden and is directing affairs, while the dominant street-level narrative holds that he is in his hometown and stronghold in Al-Dhale'.